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Bib Data Sheet

CONFIRMATION NO. 4159

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|--|---|-------------------------------|---|---|--------------------------------|
| SERIAL NUMBER 09/900,485 | FILING DATE 07/06/2001 RULE | CLASS 705 | GROUP ART UNIT 2167 | ATTORNEY DOCKET NO. 16319-05452 | |
| APPLICANTS Rod A. Cherkas, San Mateo, CA; Devin W. Breisø, La Jolla, CA; Jeffrey H. Brown, San Diego, CA; Elizabeth S. Cabrera, San Diego, CA; | | | | | |
| ** CONTINUING DATA ***** <i>NONE</i> <i>SAJ</i> | | | | | |
| ** FOREIGN APPLICATIONS ***** <i>NONE</i> <i>SAJ</i> | | | | | |
| IF REQUIRED, FOREIGN FILING LICENSE GRANTED ** 08/23/2001 | | | | | |
| Foreign Priority claimed <input type="checkbox"/> yes <input checked="" type="checkbox"/> no 35 USC 119 (a-d) conditions <input type="checkbox"/> yes <input checked="" type="checkbox"/> no <input type="checkbox"/> Met after met <i>Allowance</i> Verified and <i>SAJ</i> Acknowledged <i>Examiner's Signature</i> Initials | | STATE OR COUNTRY CA | SHEETS DRAWING 5 | TOTAL CLAIMS 26 | INDEPENDENT CLAIMS 5 |
| ADDRESS 00758 | | | | | |
| TITLE Automated, user specific tax analysis of investment transactions using a personal tax profile | | | | | |
| FILING FEE RECEIVED 1146 | FEES: Authority has been given in Paper No. _____ to charge/credit DEPOSIT ACCOUNT No. _____ for following: | | <input type="checkbox"/> All Fees <input type="checkbox"/> 1.16 Fees (Filing) <input type="checkbox"/> 1.17 Fees (Processing Ext. of time) <input type="checkbox"/> 1.18 Fees (Issue) <input type="checkbox"/> Other _____ <input type="checkbox"/> Credit | | |